Purpose

This SOP is intended to outline the process for starting a claim or log interaction.
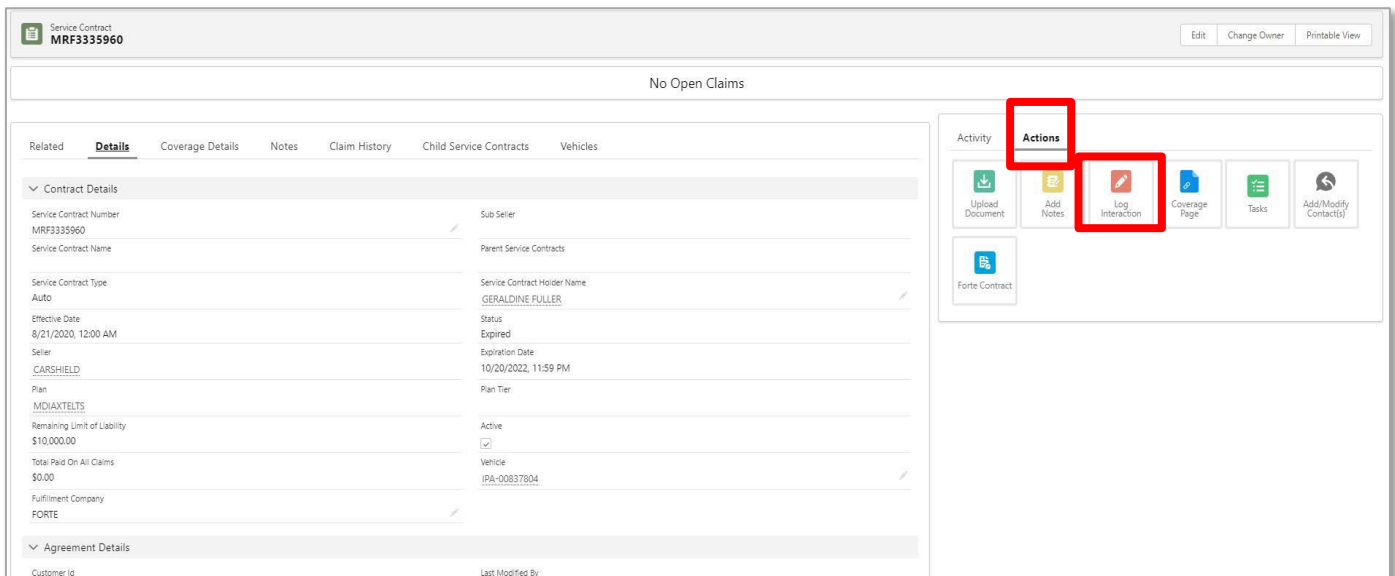
Teams Impacted

- Claims Support
- General Claims
- Technical Claims
- Customer service

Related References and Documents

- Forte.com
- NADA.com
- SOP: Finalizing Claims and Interactions.
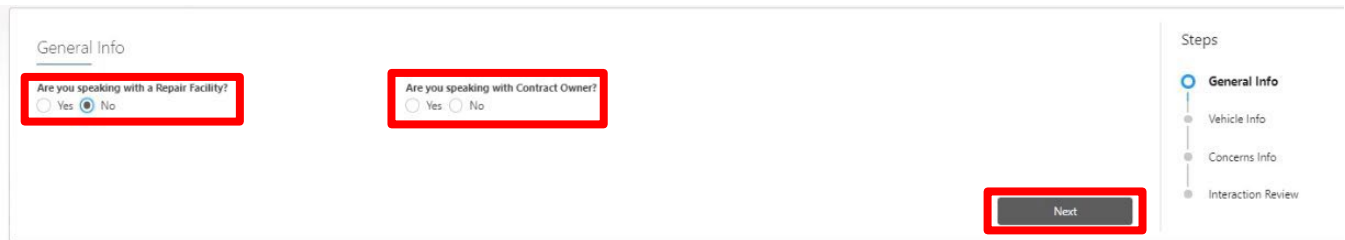- SOP: Parts Verification.
- SOP: Labor Hour verification.

Procedure

1. After following the *Contract Holder Verification* **SOP** and having the contract pulled up you will need to click the **Actions** tab, claim Log interaction.

2. The General Information screen will populate, prompting the first set of questions "*Are you speaking with the Repair Facility?*"
   a. Select the **YES** radio button. Click **Next** continue to step 5.
   b. If you select **NO,** you will be prompted "*Are you speaking with the Contract Owner?*"
      i. After verifying caller select **Yes**, see Customer Service **SOP When and How to Start an Interaction.**
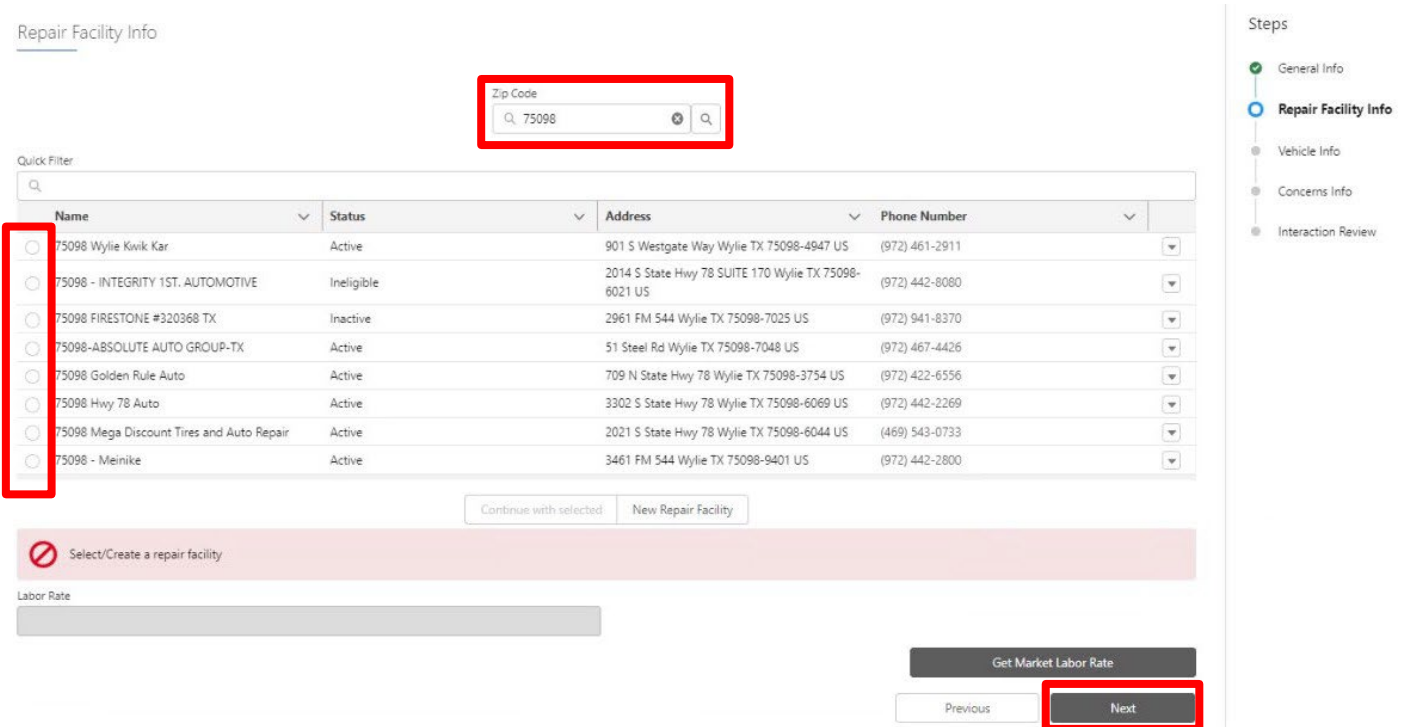
3. Start search using Zip code of the shop, it will auto-populate shops in CMS.
   a. If more than one shop search using Quick Filter box.
   b. Verify select active shop calling.
   c. Click **Next**

Note. Pay close attention to shop status if **Inactive** or **Ineligible** you will not be able to start a claim.

4. After selecting the Repair Facility, you must verify the following:
   a. Basic Info Section
   b. Other Info Section (Scroll Down)
   c. Contact will pullup if we have worked with the shop before.
      i. Select the Advisor calling in.
      ii. If selected VERIFIY email for requesting documents.
         1. If email is wrong, click **Action Arrow** to update.
   d. No contact information
      i. Click **New Contact,** fill in all information then click **Save**. (See Figure2)

Figure 2.

5. Click the **Next** button.

6. This will bring you to the Vehicle Info screen and you will need to document the following:
   a. Current mileage.
   b. Breakdown Date.
   c. Manufacture warranty in Forte
   d. Verify Vehicle is still at the Repair Facility.
   e. Driven or towed in?
   f. Was the shop able to Duplicate Problem?
   g. Diagnoses Perform for each Duplicate Problem.

7. Click the **Next** button.
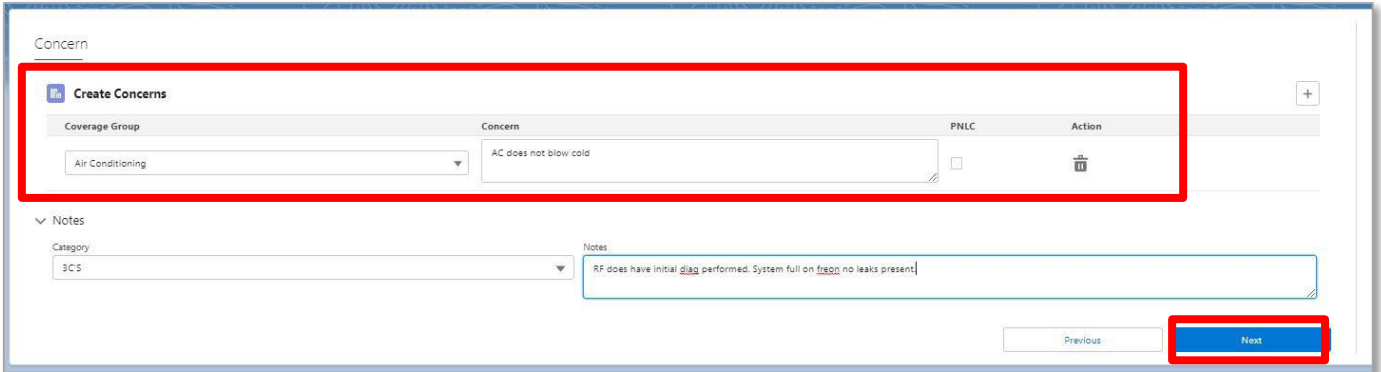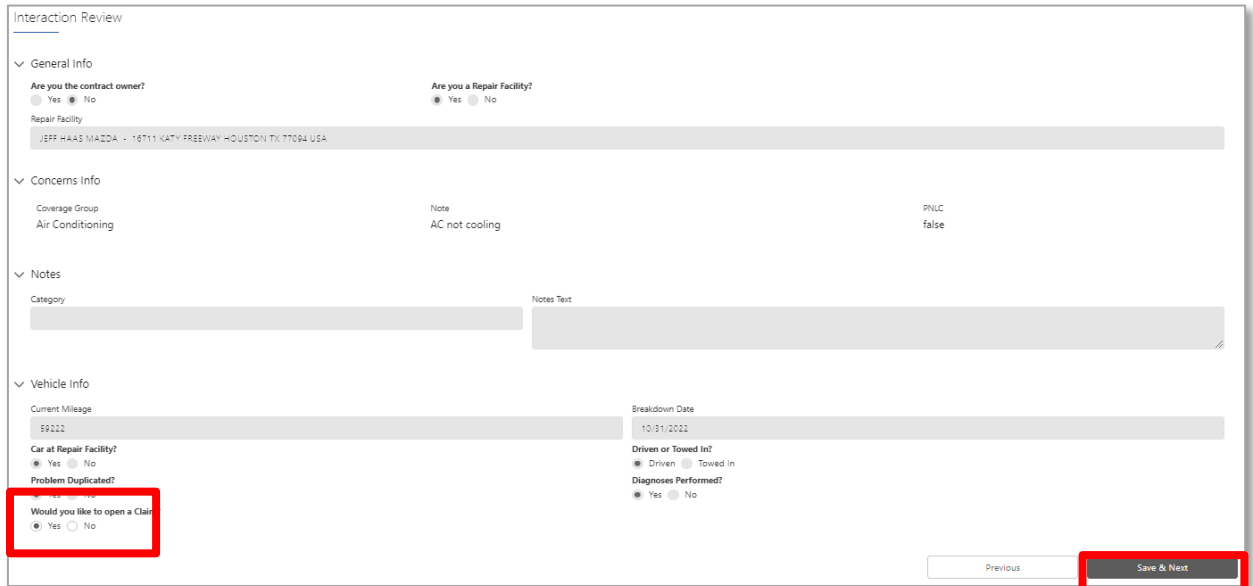
8. Here you will be able to document all concerns and technician finds being called in from the Repair Facility.

9. Start with selecting the **Coverage Group menu**, then document the **Concern** for that failed group.

10. Click the **Next** button.

11. Review the detailed information entered and determine coverage.
    a. If the part is listed for coverage, click the **Yes** radio button to start a claim.

12. Click the **Save and Next** button to continue to the next step.

13. If the **PART IS NOT LISTED** for coverage, select the **No** radio button to deny the claim.

14. Select PNLC from the drop-down menu and then click the **Save and Next button.**
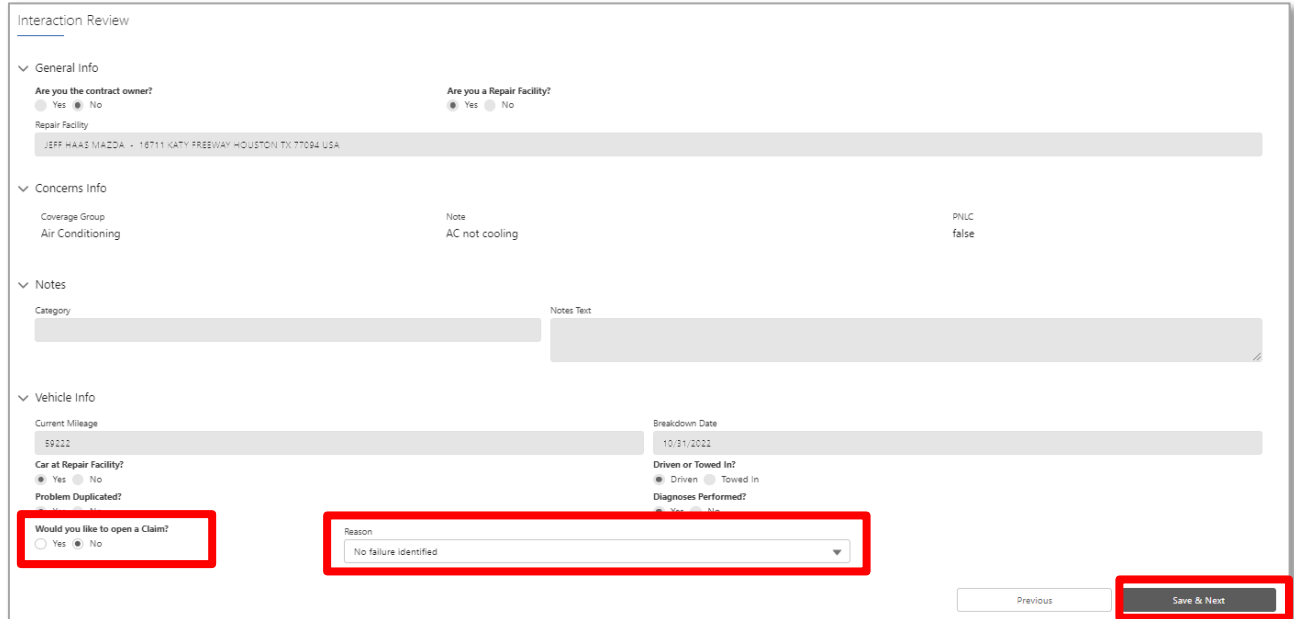
Important! Any other reason why a claim will be **DENIED** a claim must be started and denied in **ESTIMATE** screen

15. From the Initiate Claim screen, verify you are starting the claim in the right contract and then click the **Next** button.
    a. Copy the Vin Number and start pasting into all sites needed to process the claim.

16. Make sure to verify:
    a. Repair order number
    b. Any Modifications to the vehicle.
    c. Signs of Commercial use.
    d. Signs of Collison Damage.
    e. Type of claim being called in.
    f. Ask RF for current labor rate.
    g. Ask if RF is willing to negotiate their labor rate. If so, update the labor rate in the CMS RF Profile & notate the change details.
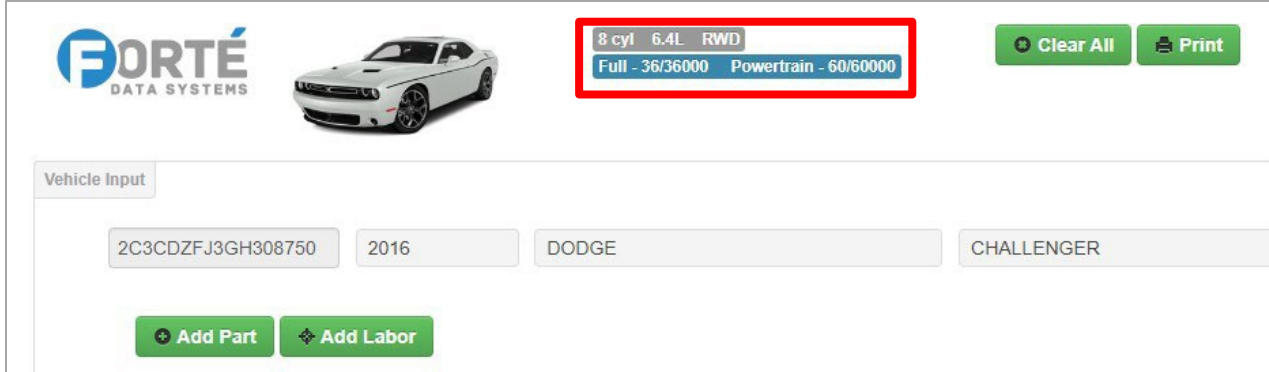   (Reference Job Aid: Updating Repair Facility)
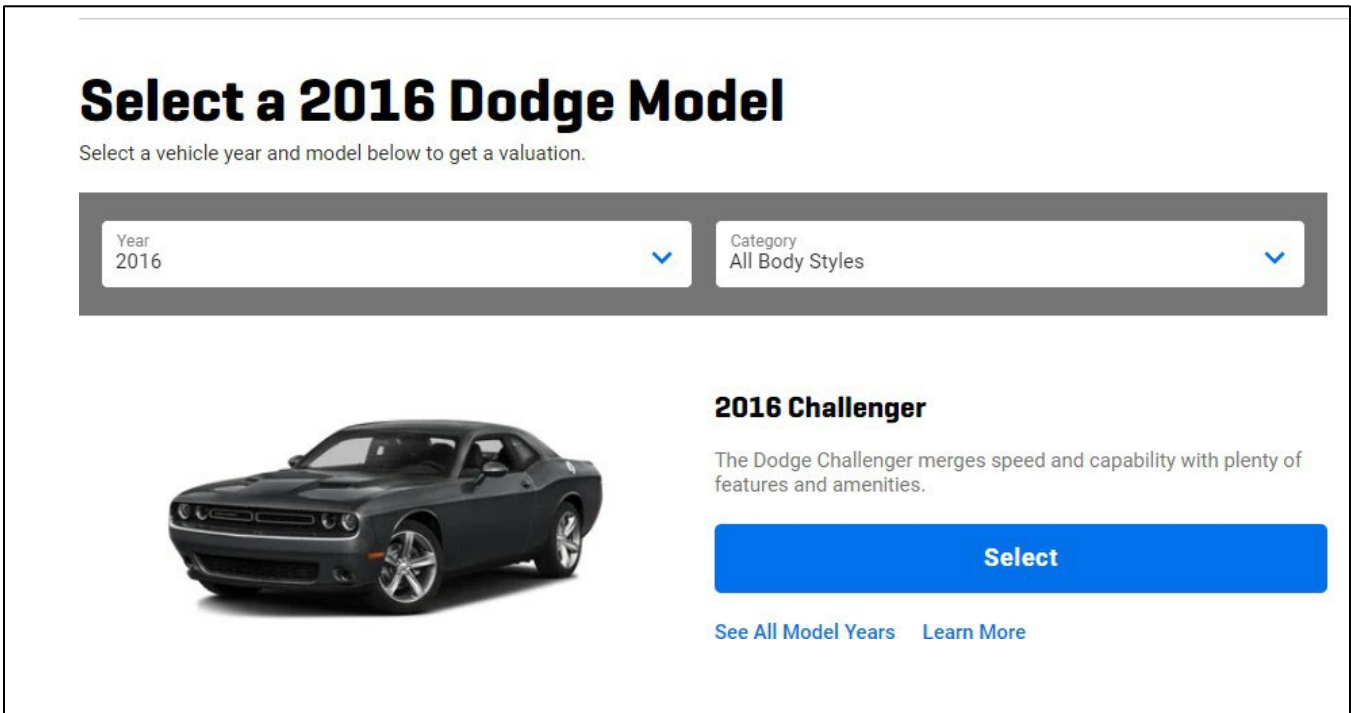
17. Enter *all* Repair Facility information and then click the **Next** button.

18. Verify, use www.forte.com
    a. Basic Factory warranty (Full)
    b. Powertrain Factory warranty

19. Use www.nada.com to verify vehicle value.
    a. Click **Get a value.**
    b. Click **Choose a Make.**
        i. Select the year from the Year drop-down menu.
        ii. Select the model.
        iii. Verify trim as close as possible.
    c. Enter the repair facility's zip code and then click the **Next** button.
    d. Use the mileage reported by the repair facility.
        i. Always use with standard equipment and click the **Next** button.

20. The NADA VALUE is listed for the claim.

21. Click the **Next** button.
    a. Must use Buy from Dealer value for NADA in CMS.
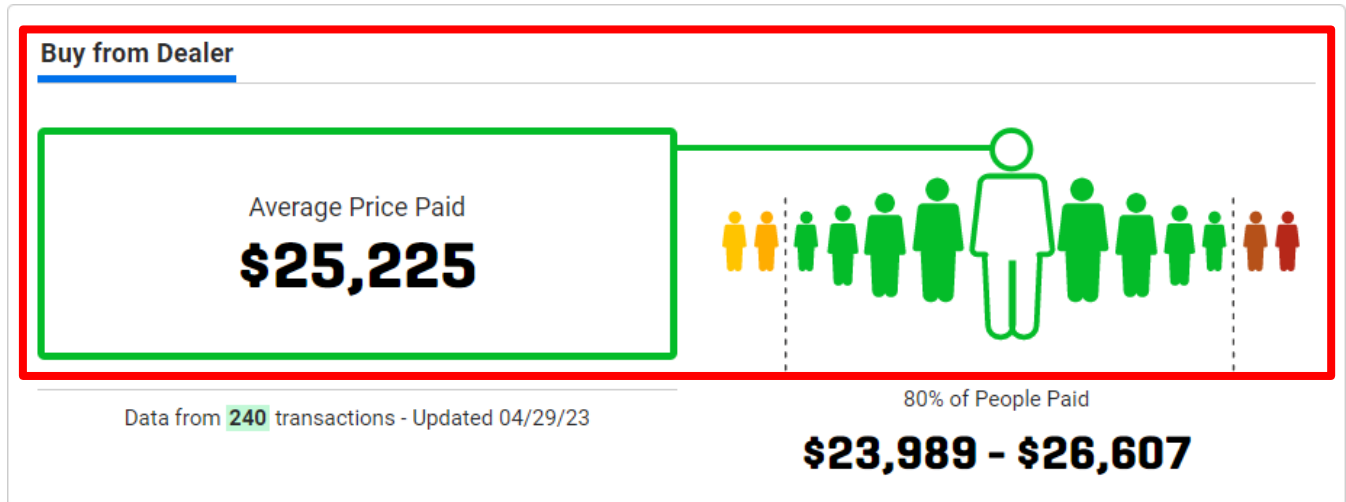
22. Enter all concerns reported by the repair facility and then click the **Next** button.
    a. Concern/s.
        i. Customer complaint/s coming in.
    b. Cause of failure.
        i. Detail diagnosis on how they verified point of failure/s.
    c. Failed component
        i. Part/s being replace.

23. Use the Claim Summary to verify all details have been entered in correctly and click the **Save Claim** button to generate a claim number.
    a. If there are no General repair concern/s, click **Reassign to Powertrain** box.
    b. Click the **Save Claim** button.

24. With a claim and claim number generated you can key in an estimate by using:
    a. SOP: Labor Hour verification.
    b. SOP: Parts Verification.
    c. SOP: Finalizing Claims and Interactions.

Approval & Revision

Date Created 2/9/2022	Created By Johnnie Martinez		Date Approved 2/28/2022	Approved By Jason Dolan
Date Revised 12/2/2022	Revised by Jesus Dominguez	Revision Description Updated to new CMS process	Date Approved 12/2/2022	Approved By Jason Dolan
Date Revised 4/27/2023	Revised by Johnnie Martinez	Revision Description Added steps up to the point of keying in estimate/ Formatting and grammar	Date Approved 4/27/2023	Approved By Chris Martin QA Kara Ness, L&D Jason Dolan, Claims
Date Revised 5/4/2023	Revised by Johnnie Martinez	Revision Description Updated NADA value to use	Date 5/8/2023	Approved By Jason Dolan
Date Revised 5/11/2023	Revised by Kara Ness	Revision Description Edited for format, grammar, and readability	Date Approved 5/11/2023	Approved By Kara Ness, L&D Kara Ness, QA
Date Revised 8/14/2023	Revised by Johnnie Martinez	Revision Description Updated new repair facility process to starting a claim	Date Approved 8/14/2023	Approved By Jason Dolan
Date Revised 05/02/2024	Revised by Gary Williams	Revision Description Added step under #16, Labor Rate Negotiation	Date Approved 05/03/2024	Approved By Jeremy Tan